

August 10, 2023

Colleen Turner
Senior Manager
Charlotte County Human Services
1010 Loveland Blvd
Punta Gorda, FL 33980

RE: SHIP Non-Profit Special Needs Rental
Project: Harbor Place (20109 Helms Way, Port Charlotte, FL 33952)
Applicant: Goodwill Industries of Southwest Florida, Inc.

Dear Ms. Turner

Attached please find one signed copy of the SHIP Non-Profit Special Needs Rental funding application. Goodwill is requesting funding to do critical repairs at Harbor Place - a rent restricted HUD Section 811 property serving special need residents.

The last funding received from Charlotte County for this specific property was over 17 years ago, when the County provided gap funding to offset new construction costs. Goodwill has never received County funding for renovations during the life of this project. These new funds are critical in order to sustain this property as an affordable housing option for special need residents.

We appreciate this opportunity for submitting this funding application and if funded, we look forward to working along side your staff on this worthwhile project.

Sincerely,



Carolyn Johnson
Senior Vice President and Chief Mission Officer

Mission:

Goodwill Industries of Southwest Florida is committed to serving people with disabilities and disadvantages by offering life-changing opportunities to achieve independence.



5100 Tice Street Fort Myers, FL 33905 Phone: 239-995-2106 Fax: 239-652-1654 TTY: 239-995-9207

www.goodwillswfl.org





Charlotte HOME
(Housing Opportunities Made Easier)
SHIP Non-profit /Low-Income/Special needs Rental

Office Use Only:

Request Date: _____ Scoping Meeting Date: _____

☒ RENTAL

☒ SPECIAL NEEDS/SUPPORTED LIVING

☒ Multi-family

☐ Single Family

☐ Other

An officer, owner, partner or sole proprietor of the Company applying must sign this form

Applicant Name/Address: Goodwill Industries of Southwest Florida, Inc. (5100 Tice Street, Ft. Myers, FL 33905)

Property Name/Address: HARBOR PLACE: 20109 (Unit 1), 20117 (Unit 2), 20125 (Unit 3), 20133 (Unit 4), 20141 (Unit 5), 20149 (Unit 6), 20517 (Unit 7), 20165 (Unit 8), 20173 (Unit 9), 20181 (Unit 10), 20172 (Unit 11), 20108 (Unit 12), 20100 (Unit 14), 20101 (Community Room) Helms Way, Port Charlotte, FL 33952

Applicant phone: 239-995-2106 Email: carolynjohnson@goodwillswfl.org

Is the applicant a: ☒ Non-profit [attach current IRS designation as 501(c)(3)]
☐ Community Land Trust

Subject Property Tax ID Number: 4022-1616-0007

Property Acreage: Three(3) acres

Legal Description of proposed property: See attached

Total number of units on property 14 Number of units proposed for rehab 14

Average resident income: ☐ 60-80% AMI ☐ <60% AMI ☐ <30% AMI (Equal to or less than 50% AMI)

Proposed rental rates: Rent restricted to 30% of household income. Income restricted to 50% or less AMI household income.

Existing Land Use Restriction Agreement (LURA) on property ☐ Yes ☐ No

Term of Affordability: ☐ Perpetuity ☐ 50 years ☐ 21-49 years ☐ 20 years (40 years with expiration in 2048)

Incentives Requested (check only those that apply):

☐ Expedited Permitting ☐ Impact Fee Waiver ☐ Utility Fees ☐ Density ☒ (None)

Signature: Carolyn A. Johnson Date: 8/10/2023

Funding/incentive awards subject to availability.

See page 2 for additional required information.

SHIP Non-Profit/Low Income Special Needs Rental - Additional Required Information

Describe the Scope of the Project Including all Hurricane-Related Repairs

In 2009 Southwest Florida GHI Housing XI, Inc. (a single asset/single purpose corporation formed by Goodwill Industries of Southwest Florida) received approximately \$1.6 million in HUD Section 811 funds to construct 14 total units (nine one bedroom and five two bedroom) of supportive housing for persons with disabilities who have household incomes defined as very low. The project is located at Helm Street in Port Charlotte, Florida, 33952.

Each apartment is approximately 485-626 square feet and contains a kitchen complete with a front-control range, refrigerator, range hood, pantry and ample storage. The unit is designed to maximize a variety of furniture placement options, while providing ample space for living, eating, sleeping and cooking functions. All units and all common areas are fully handicap accessible. Exterior and interior community space is provided in the form of a community room and outside area. The communal areas have been designed to maximize resident interaction amongst each other, as well as amongst friends, staff, and visitors.

On behalf of Southwest Florida GHI Housing XI, Inc., Goodwill Industries of Southwest Florida is requesting \$419,382 in Charlotte County SHIP funds for Special Needs Housing for capital improvements to upgrade the property and enhance resident living, reduce energy costs for both residents and the project, improve safety and security for residents, and reduce long-term operating costs. Attached is a quote from the contractor. The following is a summary of the proposed improvements:

<u>Item</u>	<u>Amount</u>
Kitchen cabinets, countertops, sink	\$ 80,139
Flooring	\$ 61,147
Entrance doors (energy efficient and hurricane resistant)	\$ 8,852
Windows (energy efficient and hurricane resistant)	\$ 33,600
Park lot resurface	\$ 18,500
Exterior parking lot lighting (energy efficient)	\$ 11,900
Surveillance cameras on exterior	\$ 5,875
Exterior painting	\$ 55,371
Appliances (refrigerator, range, range hood, water heater, HVAC)	\$113,458
GC overhead and profit	\$ Incl
Administrative/legal	\$ 30,000
Total	\$419,382

It should be noted that whenever Goodwill undertakes renovations, they do so with the goal of reducing energy costs to both the residents and project. For this project, energy efficient upgrades will occur in the entrance doors, exterior lighting, and refrigerators and HVAC systems.

In addition to energy efficient upgrades, several renovation items focus on the resident safety and security. Goodwill has found that special need residents often need additional safety and security enhances in order to make them feel safe in their homes. Hurricane resistant windows and doors will help prevent damage from future storms. Surveillance cameras provide residents will an additional security outside of their units.

Although the rents and operations are subsidized by HUD, the funding provided has not allowed the Owner to properly fund the Reserve for Replacement account to keep pace with long term capital replacement items. These capital replacement items have increased at a pace which is greater than HUD allows for. Although the Owner has petitioned and has received periodic rent/operational budget increases, these increases have only allowed the Owner to keep pace with day-to-day management and not long-term capital improvements. As a result of these factors, the Owner is in need of supplemental funding to proceed with required capital replacement items.

It should be noted that none of the above listed repairs are “hurricane” related, nor has the Owner requested insurance funds to pay for any of these items.

Outline Project Readiness (Site Control, Zoning, Construction Timeline etc.)

The property has been in operation since 2009 and is currently 100 percent occupied. All the applicable local codes were met when constructed and the property continues to be compliant with all applicable codes today.

With respect to the schedule, there are two distinct elements. First, Goodwill will need to secure the approval from HUD, given that the property will have an encumbrance associated with Charlotte County’s grant. Goodwill anticipates this process will take 60 to 90 days from issuance of draft agreements from Charlotte County. Upon approval of HUD and execution of required documents, Goodwill anticipates approximately 90-120 days to pull permits and complete the work. It should be noted that Goodwill has already procured quotes for this work (see attached) and this will speed pre-construction scheduling.

Identify Other Funding Sources for the Project

Although the rents and operations are subsidized by HUD, the funding provided has not allowed the Owner to properly fund the Reserve for Replacement account to keep pace with long term capital replacement items. These capital replacement items have increased at a pace which is greater than HUD allows for. Although the Owner has petitioned and has received periodic rent/operational budget increases, these increases have only allowed the Owner to keep pace with day-to-day management and not long-term capital improvements. As a result of these factors, the Owner is in need of supplemental funding to proceed with required capital replacement items. No other funding will be used except SHIP funds.

Disclose Any Existing Liens, mortgages or Other Encumbrances on the Property

This project was initial financed with HUD Section 811 funding. This funding restricted the use of the multi-family property for special need residents. Resident household incomes must be at or below 50 percent of the average median income for the area and residents rent cannot exceed 30 percent of their household income. A forty-year HUD mortgage was entered into on 2009 and expires in 2048.

Describe Property Development/Management Experience

Goodwill Industries has a history of providing affordable housing to special need residents. It began as simply a referral process offering one-on-one support, to the development of 16 affordable housing projects. Goodwill, and its management agent (Columbia Property Group), enjoy a close working relationship with HUD and its properties continually receive high HUD scores with respect to both property maintenance and management.

The following is a brief summary of the projects which Goodwill has developed.

- *Park Villas – N. Ft. Myers, Section 811 (066-HD022):* This is a 16-unit complex for persons with physical disabilities, which includes the elderly. Goodwill paid for off-site sewer/water/roads to develop this tranquil site. The project has proceeded through HUD final closing and is now 100 percent occupied. Goodwill employs an on-site manager to operate the project. Goodwill was able to garner the support of the local government and local foundations to pay for up-grades to the project and reduce impact fees.
- *Laurel Oaks – Cape Coral, Section 811 (066-HD029):* This is a 12-unit project consisting of one- and two-bedroom units. This project has proceeded through HUD final closing and is now 100 percent occupied. This project is for special need persons. Goodwill creatively used several duplex lots and worked diligently with the city to produce an efficient and attractive apartment project. Goodwill needed to obtain a variance for the construction of this project. This was obtained quickly and efficiently.
- *Broadway Place – Ft. Myers, Section 811 (066-HD042):* This 12-unit project is complete. Goodwill escrowed \$25,000 of its own funds to connect to/bring water/sewer to the site. Although the site work was quite complex, Goodwill oversaw its successful development. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Glendale Village – Lehigh Acres, Section 811 (066-HD044):* This project represented the first housing for any special needs' populations in this western rural area of Lee County. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Santa Barbara Village – Cape Coral, Section 811 (066-HD045):* This was the second

project for special need persons in Cape Coral. The project has proceeded through HUD final closing and is now 100 percent occupied.

- *William Place – Punta Gorda, Section 811 (066-HD046)*: This 12-unit project is the first special needs housing project to be developed in Charlotte County. The project's central location and proximity to downtown ensures easy access for the disabled and the elderly. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Ohio Place – Ft. Myers, Section 811 (066-HD048)*: This is a 15-unit duplex project constructed within a minority community in Ft. Myers. The design of this project was unique, in that it consisted of individual duplex buildings, which maximized disabled residents' integration into the neighborhood. The project is complete and 100 percent occupied.
- *Hatton B. Rogers Apartments – N. Ft. Myers, Section 202 (066-EE081)*: This is a 54-unit HUD 202 elderly project located adjacent to an existing HUD 811 sponsored by Goodwill and also adjacent to a Goodwill store, County Park, and County Library. This project was supplemented with \$154,000 of County funds. These funds went to improve and enhance the project's design. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Coronado Place – Cape Coral, Section 811 (066-HD049)*: This is a 12-unit apartment complex located in the downtown area of Cape Coral. To make this project happen, the City provided \$60,000 and the Sponsor added \$20,000 of their own funds. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *The Pines – N. Ft. Myers, Section 811 (066-HD053)*: This is a 14-unit apartment complex located within a block walking distance of a grocery store and shopping center. Goodwill purchased the site in advance of the HUD funding notification, which demonstrates the Goodwill's willingness to spend capital funds and take risks when seeking HUD 811 funding. The County contributed \$420,000 in supplemental funding on this project. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Harbor Place Apartments – Pt. Charlotte, Section 811 (066-HD055)*: This is a 14-unit apartment complex located adjacent to an existing store. This location provides residents with employment opportunities. Goodwill received \$200,000 in supplemental funding from Charlotte County. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Country Cove Apartments – Lehigh, Section 811 (066-HD056)*: This is a 14-unit apartment complex is located within a quiet residential community and near to shopping and services. This location provides residents with employment opportunities. Goodwill purchased the site in advance of the HUD funding notification, which demonstrates the Goodwill's willingness to spend capital funds and take risks when seeking HUD 811 funding. Goodwill obtained \$307,000 in supplemental funding from the County, as well

as bonus density waivers to allow for the development of this project. The project has proceeded through HUD final closing and is now 100 percent occupied.

- *Palmetto Ranch – Labelle, Section 811 (066-HD057)*: This 14-unit development is the first of its kind providing permanent housing for the disabled of Labelle. The facility is part of a neighborhood renovation project which includes a store and a second phase Section 811 project. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Palmetto Ranch II – Labelle, Section 811 (066-HD058)*: This is 14-unit development represents Phase II to a multi-million-dollar investment Goodwill made in this qualified Community Development Block Grant area. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Jean Devereaux Apartments - N Ft. Myers, Section 811 (066-HD062)*: This is a 14-unit duplex project constructed within unincorporated Lee County. The design of this project was unique, in that it consisted of individual duplex buildings, which maximized disabled residents' integration into the neighborhood. The development was built to meet green standards per Florida Green Building Coalition (FGBC) The project is complete and 100 percent occupied.
- *Sweetwater Place Apartments - Labelle, Section 811 (066-HD061)*: This is a 14-unit duplex project constructed within unincorporated Lee County. The design of this project was unique, in that it consisted of individual duplex buildings, which maximized disabled residents' integration into the neighborhood. The development was built to meet green standards per Florida Green Building Coalition (FGBC) The project is complete and 100 percent occupied.

Describe Any Past or Present Litigation Involving the Properties Managed

None of the properties listed currently have nor have ever been subject to litigation. All the properties meet current HUD program guidelines and consistently receive high scores for both management and property maintenance.

Services and Programs Offered to Residents

HUD Section 811 funding is termed independent/supportive living housing. This means that in order for residents to live independently, they need supportive services. The services provided are individual in nature and vary from resident to resident. The following table highlights the type of services and programs that residents have access to.

Strategy	Description	Program
Strive to improve independent living	Accessible transportation	Property manager and local case managers connect residents with Charlotte County Transportation Disadvantaged Program (TD). This door to door assists residents without a car or other method of transportation.
Strive to improve independent living	Assistance with technology to help residents to communicate	Property manager and local case managers connect residents the Center for Independent Living Gulf Coast (CIL) and/or Lighthouse of Southwest Florida. Both offer assistive technology program
Strive to improve independent living	Assist residents in employment training and job placement	Residents have access to a variety of Goodwill programs which include the Community Resource Center, Mobile Community Resource Center for residents who are transportation challenged, Digital Skills Training and Certification, Digital Navigator, Pathways to Work, and MicroEnterprise Program. For residents with a specific disability, they can access employment programs offered by CIL.
Strive to improve independent living	Life skill training for individuals with specific types of disability.	Depending if a resident has visual, hearing, or developmental challenges, Goodwill partners with several nonprofits who offer life skill training. These include CIL, and Lighthouse of Southwest Florida.
Strive to improve independent living	Support resident case manager	Many of the residents of this project have individual case manager. These vary by the resident's disability. Property manager seeks to assist individual case managers by communicating project specific requirements, changes, policies etc. In addition, property managers work with both residents and their case managers on hurricane preparation guidelines and standards. Lastly, the property manager has access to a plethora of supportive services offered by Goodwill. These services are communicated to both the resident and their case manager.

Encourage integration and inclusion into the community at-large	Design projects to mimic local housing type, while at the same being fully handicap accessible.	Goodwill used a duplex-style development which integrates the housing into the neighborhood and retain the single-family flavor and makes it difficult to distinguish this housing or its residents from its neighbors. This concept was successfully used by Goodwill at other special need projects.
Off-site amenities and recreational activities	Affordable housing projects serving special need residents should be located within close proximity to essential services needed to encourage independent living.	Goodwill strives to locate housing within close proximity to services residents need. Within one mile of the project include post office, ten dentists, ten doctors, three pharmacies, one grocery store, two department stores and four banks. Within 1.25 miles is a public library.

Describe Plan for Tenant Relocation During Rehabilitation

Goodwill has completed over \$1.6 million in renovations on 14 of its 16 existing projects. The scope for these renovations is similar to that of Harbor Place. In the past, the management company has worked closely with the residents, construction company, and Goodwill to prevent the overnight relocation of residents. The most disruptive work scope element will be the cabinets and flooring. In this case, residents will vacate their apartment for the day and return home that evening at 5pm. For the day, they will have the option of staying with friends/friends, utilizing the on-site community room at the property, or staying at a nearby Goodwill facility.

Other Information (including special needs criteria if applicable)

Residents of Harbor Place must have a documented physical or developmental disability. Goodwill finds that most all residents are currently receiving Social Security Disability Income (SSDI). They must also meet the income criteria, as set forth by HUD. Their household income is re-certified annually.

Additional information, which is attached at the end of this narrative section includes;

- Legal description of property
- General contractor quote for work proposed
- Complete address for all units at the property

Revised Scope of Work
Goodwill Industries of SW Florida - Harbor Place

<u>Item</u>	<u>Amount</u>
Kitchen cabinets, countertop, sink	\$ 80,139
Flooring	\$ 61,147
Entrance doors (energy efficient and hurricane resistant)	\$ 8,852
Windows (energy efficient and hurricane resistant)	\$ 33,600
Exterior parking lot lighting (energy efficient)	\$ 11,900
Surveillance cameras on exterior	\$ 5,875
Exterior painting	\$ 55,371
Appliances (refrigerator, range, range hood, water heater, HVAC)	\$113,458
Total	\$370,342

Attachment A
Legal Description

EXHIBIT "A"
LEGAL DESCRIPTION
SOUTHWEST FLORIDA GWI HOUSING XI, INC.
HUD Project No. 066-HD055

LOTS 9, 10, 11 AND 12, BLOCK 436, PORT CHARLOTTE
SUBDIVISION SECTION EIGHTEEN, ACCORDING TO THE MAP OR
PLAT THEREOF AS RECORDED IN PLAT BOOK 5, PAGE(S) 8A
THROUGH 8E, PUBLIC RECORDS OF CHARLOTTE COUNTY,
FLORIDA AND BEING FURTHER DESCRIBED AS FOLLOWS.
COMMENCE AT THE SOUTHEAST CORNER OF SAID LOT 12 AND
RUN N48°59'46"W, ALONG THE SOUTH LINE OF SAID LOTS 12,
11, 10, AND 9 AND THE NORTHERLY RIGHT-OF-WAY LINE OF
NORTH ELLICOTT CIRCLE, A DISTANCE OF 320.00 FEET TO THE
SOUTHWEST CORNER OF SAID LOT 9; THENCE N41°00'14"E,
ALONG THE WEST LINE OF SAID LOT 9, A DISTANCE OF 125.00
FEET TO THE NORTHWEST CORNER OF SAID LOT 9; THENCE
S48°59'46"E, ALONG THE NORTH LINE OF SAID LOTS 9, 10, 11,
AND 12, A DISTANCE OF 320.00 FEET TO THE NORTHEAST
CORNER OF SAID LOT 12; THENCE S41°00'14"W, ALONG THE
EAST LINE OF SAID LOT 12, A DISTANCE OF 125.00 FEET TO
THE POINT OF BEGINNING.

Attachment B
Construction Quote

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Insured: Harbor Place Apartments
Business: 20101 Helms Way
Port Charlotte, FL 33917

Claim Number:

Policy Number:

Type of Loss:

Date of Loss:

Date Received:

Date Inspected:

Date Entered: 8/4/2023 10:14 AM

Price List: FLFM8X_01JUN23
Restoration/Service/Remodel
Estimate: HARBOR_PLACEJH

HARBOR_PLACEJH

Interior Units

DESCRIPTION	QTY	REMOVE	REPLACE	TAX	O&P	TOTAL
1. R&R Cabinetry - upper (wall) units Replacement of Cabinets in all 14 units	154.00 LF	12.00	184.90	1,308.01	3,163.06	34,793.67
2. R&R Cabinetry - lower (base) units	112.00 LF	12.00	250.00	1,593.59	3,093.76	34,031.35
3. R&R Countertop - flat laid plastic laminate	168.00 LF	7.00	35.00	320.17	737.62	8,113.79
4. R&R Sink - double basin - Standard grade	14.00 EA	32.00	199.00	166.28	340.02	3,740.30
5. R&R Snaplock Laminate - simulated wood flooring	6,300.00 SF	1.87	6.75	1,281.74	5,558.78	61,146.52
Totals: Interior Units				4,669.79	12,893.24	141,825.63 ✓

Exterior

DESCRIPTION	QTY	REMOVE	REPLACE	TAX	O&P	TOTAL
6. R&R Exterior door - metal - insulated - flush or panel style	14.00 EA	34.24	514.91	358.91	804.72	8,851.73
7. Pre-hung Impact Window	42.00 EA	0.00	800.00	0.00	0.00	33,600.00
8. Re-Seal Parking Lot	1.00 EA	0.00	18,500.00	0.00	0.00	18,500.00
9. Replace Exterior Lighting LED	14.00 EA	0.00	850.00	0.00	0.00	11,900.00
10. R&R Surveillance system - cameras, monitors, etc.	1.00 EA	239.74	4,897.89	203.43	534.10	5,875.16
11. Exterior - paint two coats	49,000.00 SF	0.00	1.00	1,337.70	5,033.78	55,371.48
Stucco Dash Repairs, Seal Cracks, and Paint						
Totals: Exterior				1,900.04	6,372.60	134,098.37

Appliances

DESCRIPTION	QTY	REMOVE	REPLACE	TAX	O&P	TOTAL
12. R&R Refrigerator - top freezer - 14 to 18 cf	14.00 EA	53.28	731.68	637.00	1,162.66	12,789.10
13. R&R Range hood	14.00 EA	20.00	236.00	118.28	370.22	4,072.50
14. R&R Range - freestanding - electric - Standard grade	14.00 EA	32.17	696.64	546.00	1,074.94	11,824.28
15. R&R Water heater - 40 gallon - Electric - 6 yr	14.00 EA	92.41	1,013.88	486.50	1,597.48	17,572.04
16. HVAC Split System Replacement	14.00 EA	0.00	4,800.00	0.00	0.00	67,200.00
HARBOR_PLACEJH					8/4/2023	Page: 2

CONTINUED - Appliances

DESCRIPTION	QTY	REMOVE	REPLACE	TAX	O&P	TOTAL
Totals: Appliances				1,787.78	4,205.30	113,457.92
Line Item Totals: HARBOR_PLACEJH				8,357.61	23,471.14	389,381.92

Coverage	Item Total	%	ACV Total	%
Dwelling	258,181.92	66.31%	258,181.92	66.31%
Other Structures	0.00	0.00%	0.00	0.00%
Contents	131,200.00	33.69%	131,200.00	33.69%
Total	389,381.92	100.00%	389,381.92	100.00%

Summary for Dwelling

Line Item Total	226,353.17
Material Sales Tax	8,357.61
Subtotal	234,710.78
Overhead	11,735.57
Profit	11,735.57
Replacement Cost Value	\$258,181.92
Net Claim	\$258,181.92

Summary for Contents

Line Item Total	131,200.00
Replacement Cost Value	<u>\$131,200.00</u>
Net Claim	<u><u>\$131,200.00</u></u>

Recap by Room

Estimate: HARBOR_PLACEJH

Interior Units		124,262.60	34.75%
Coverage: Dwelling	100.00% =	124,262.60	
Exterior		125,825.73	35.19%
Coverage: Dwelling	49.14% =	61,825.73	
Coverage: Contents	50.86% =	64,000.00	
Appliances		107,464.84	30.06%
Coverage: Dwelling	37.47% =	40,264.84	
Coverage: Contents	62.53% =	67,200.00	
<hr/>		<hr/>	
Subtotal of Areas		357,553.17	100.00%
Coverage: Dwelling	63.31% =	226,353.17	
Coverage: Contents	36.69% =	131,200.00	
<hr/>		<hr/>	
Total		357,553.17	100.00%

Recap by Category

O&P Items			Total	%
APPLIANCES			23,300.48	5.98%
Coverage: Dwelling	@	100.00% =	23,300.48	
CABINETRY			62,354.60	16.01%
Coverage: Dwelling	@	100.00% =	62,354.60	
GENERAL DEMOLITION			20,086.14	5.16%
Coverage: Dwelling	@	100.00% =	20,086.14	
DOORS			7,208.74	1.85%
Coverage: Dwelling	@	100.00% =	7,208.74	
ELECTRICAL - SPECIAL SYSTEMS			4,897.89	1.26%
Coverage: Dwelling	@	100.00% =	4,897.89	
FLOOR COVERING - WOOD			42,525.00	10.92%
Coverage: Dwelling	@	100.00% =	42,525.00	
PLUMBING			16,980.32	4.36%
Coverage: Dwelling	@	100.00% =	16,980.32	
PAINTING			49,000.00	12.58%
Coverage: Dwelling	@	100.00% =	49,000.00	
O&P Items Subtotal			226,353.17	58.13%
Non-O&P Items			Total	%
USER DEFINED ITEMS			131,200.00	33.69%
Coverage: Contents	@	100.00% =	131,200.00	
Non-O&P Items Subtotal			131,200.00	33.69%
O&P Items Subtotal			226,353.17	58.13%
Material Sales Tax			8,357.61	2.15%
Coverage: Dwelling	@	100.00% =	8,357.61	
Overhead			11,735.57	3.01%
Coverage: Dwelling	@	100.00% =	11,735.57	
Profit			11,735.57	3.01%
Coverage: Dwelling	@	100.00% =	11,735.57	
Total			389,381.92	100.00%

Attachment C
Tax Record for Property



Real Property Record Search

***** CLICK ON PARCEL ID FOR PARCEL DETAIL *****

Parcel ID	Owner	Property Address	Short Legal	2022 Certified Just Value ²	2022 Certified Taxable Value ²	Current Use Code
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20109 HELMS WAY -UNIT 1	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20181 HELMS WAY -UNIT 10	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20172 HELMS WAY -UNIT 11	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20180 HELMS WAY -UNIT 12	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20108 HELMS WAY -UNIT 13	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20100 HELMS WAY -UNIT 14	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20117 HELMS WAY -UNIT 2	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20125 HELMS WAY -UNIT 3	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20133 HELMS WAY -UNIT 4	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20141 HELMS WAY -UNIT 5	PCH 018 0436 0009	\$786,668	\$0	0300

²As of January 1, 2022Page 1 of 2 [Next](#) [Last](#)

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CHARLOTTE COUNTY PROPERTY APPRAISER
PAUL L. POLK, CFA, AAS, RES

Real Property Record Search

***** CLICK ON PARCEL ID FOR PARCEL DETAIL *****

Parcel ID	Owner	Property Address	Short Legal	2022 Certified Just Value ²	2022 Certified Taxable Value ²	Current Use Code
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20149 HELMS WAY -UNIT 6	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20157 HELMS WAY -UNIT 7	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20165 HELMS WAY -UNIT 8	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20173 HELMS WAY -UNIT 9	PCH 018 0436 0009	\$786,668	\$0	0300
402216160007	SOUTHWEST FLORIDA GWM HOUSING XI INC	20101 HELMS WAY -UNIT Comm Rm	PCH 018 0436 0009	\$786,668	\$0	0300

²As of January 1, 2022

[First](#) [Previous](#) Page 2 of 2

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CHARLOTTE COUNTY PROPERTY APPRAISER

PAUL L. POLK, CFA, AAS, RES

Real Property Information for 402216160007 for the 2023 Tax Roll

The Charlotte County Property Appraiser makes every effort to produce and publish the most current and accurate information possible. No warranties, expressed or implied, are provided for the data herein, its use, or its interpretation.

If a discrepancy is discovered in your property's records, or those of another, please bring it to our attention immediately.

Report Hurricane Ian Damage

Owner:

SOUTHWEST FLORIDA GWI HOUSING XI INC
4250 HATTON ROGERS LN
NORTH FORT MYERS, FL 33903-7813

Ownership current through: 7/27/2023

Property Location:

Property Address: 20100 HELMS WAY -UNIT 14
or 20101 HELMS WAY -UNIT Comm Rm
or 20108 HELMS WAY -UNIT 13
or 20109 HELMS WAY -UNIT 1
or 20117 HELMS WAY -UNIT 2
or 20125 HELMS WAY -UNIT 3
or 20133 HELMS WAY -UNIT 4
or 20141 HELMS WAY -UNIT 5
or 20149 HELMS WAY -UNIT 6
or 20157 HELMS WAY -UNIT 7
or 20165 HELMS WAY -UNIT 8
or 20172 HELMS WAY -UNIT 11
or 20173 HELMS WAY -UNIT 9
or 20180 HELMS WAY -UNIT 12
or 20181 HELMS WAY -UNIT 10

Property City & Zip: PORT CHARLOTTE 33952

Business Name: HARBOR PLACE APARTMENTS

General Parcel Information

Taxing District:	104
In City of Punta Gorda:	NO
<u>Current Use:</u>	MULTI-FAMILY 10 UNITS OR MORE
<u>Future Land Use (Comp. Plan):</u>	US 41 Mixed Use
<u>Zoning Code:</u>	PD
Market Area / Neighborhood / Subneighborhood:	01/73/03000
Map Number:	4A16N
Section/Township/Range:	16-40-22
SOH Base Year:	0
Waterfront:	NO

Sales Information

Date	Book/Page	Instrument Number	Selling Price	Sales code	Qualifica
8/16/2007	3205/1974	1698961	\$221,000	VAC-MULTI	
2/1/2002	2003/1996	888068	\$1,300,000	IMPR-MULTI	
3/1/1985	808/1388	1985080801388	\$5,000	VACANT	

Click on the book/page or the instrument number to view transaction document images on the Clerk of the Circuit Court's web site.
Click on Qualification/Disqualification Code for a description of the code. Codes are not available prior to 2003.

FEMA Flood Zone (Effective 12/15/2022)

Firm Panel	Floodway SFHA		Flood Zone	FIPS	COBRA	Community	Base Flood Elevation (ft.)	Letter of Map Revision (LOMR)
0226G	OUT	IN	10AE	12015C	Outside of CBRA Zone	120061	10 NAVD88	
0226G	OUT	OUT	X	12015C	Outside of CBRA Zone	120061	0 NAVD88	

*If parcel has more than 1 flood zone, refer to the flood maps available on the GIS web site by clicking on View Map below. [Flood term definitions](#).
For more information, please contact Building Construction Services at 941-743-1201.

Preliminary 2023 Value Summary

Approach	Land	Land Improvements	Building	Damage	Total
Cost Approach	\$108,000	\$22,419	\$1,294,992	\$0	\$1,425,411
Income Approach					\$1,040,190
Market Approach					N/A
Classified Value					N/A

2023 Preliminary Tax Roll Values, as of January 1, 2023

*Preliminary values within this box are NOT certified (final) values. Consequently, they can change periodically as records are updated. Notices of Proposed Property Taxes (TRIM Notice) are typically mailed mid-August and final values certified mid-October.

Value	County	City	School	Other
Preliminary Just Value (Just Value reflects 193.011 adjustment):	\$884,162	\$884,162	\$884,162	\$884,162
Preliminary Assessed Value:	\$865,335	\$865,335	\$884,162	\$865,335
Preliminary Exemption - 33 Charitable	\$865,335	\$865,335	\$884,162	\$865,335
Preliminary Taxable Value:	\$0	\$0	\$0	\$0

Land Information

Line	Description	Land Use	Zoning	Unit Type	Units	Depth	Table/ Factor	Acreage
1	PCH 018 0436 0009	0300	PD	SQUARE FOOT	10000	0		0
2	PCH 018 0436 0010	0300	PD	SQUARE FOOT	10000	0		0
3	PCH 018 0436 0011	0300	PD	SQUARE FOOT	10000	0		0
4	PCH 018 0436 0012	0300	PD	SQUARE FOOT	10000	0		0

Land Value may be adjusted due to scrub jay habitat. You can access [the Board of County Commissioner's website](#) to determine if this parcel is within scrub jay habitat. For more information on scrub jay habitat within Charlotte County, see the [County's Natural Resources web site](#).

Land Improvement Information

Code	Description	Size	Year Built	Year Condition
1012	Storm Water Drainage	3780	2008	2008
1012	Storm Water Drainage	3811	2008	2008
1221	Wall - 8" Block, With Stucco 2 sides (sf)	869	2008	2008
1310	Paving - Asphalt (sf)	3780	2008	2008
1320	Paving - Concrete (sf)	3811	2008	2008
1624	Irrigation - Commercial - Class III - 10k (fv)	1	2008	2008
1710	Light Poles - Avg (#)	6	2008	2008
1770	Lights - Vapor, Avg (#)	6	2008	2008
1791	Lights - Wallmounts, Low (#)	17	2008	2008

[View Building Sketch](#)

Building Information

Building Number	Description	Quality	Building Use	Year Built	Year Cond	Floors	Rooms	Bedrooms	Plumbing Fixtures	Area	A/C Area	Total Area
1	OFFICE/DUPLEX /LAUNDRY		1700	2008	2008	1	6	0	0	1880	1880	1880
2	Duplex 2 units	3	0800	2008	2008	1	6	4	10	1361	1361	1461
3	Duplex 2 units	3	0800	2008	2008	1	6	4	10	1361	1361	1461
4	Duplex 2 units	3	0800	2008	2008	1	6	2	10	1118	1118	1214
5	Duplex 2 units	3	0800	2008	2008	1	6	2	10	1118	1118	1214
6	Duplex 2 units	3	0800	2008	2008	1	6	2	10	1118	1118	1214
7	Duplex 2 units	3	0800	2008	2008	1	6	2	10	1118	1118	1214

Building Component Information

Bld #	Code	Description	Category	Area	Percent	Year Built	Year Cond	Type
1	169	Masonry, Stucco on Block	Exterior Walls	0	100	2008	2008	Construction Component
1	208	Composition Shingle	Roofing	0	100	2008	2008	Construction Component
1	351	Warmed & Cooled Air	Heating/Cooling	0	100	2008	2008	Construction Component

1	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2008	2008	Construction Component
1	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2008	2008	Construction Component
1	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2008	2008	Construction Component
1	621	Slab on Grade (% or SF)	Miscellaneous	0	100	2008	2008	Construction Component
1	40049	High Impact Glass (%)	Segregated Costs	0	100	2008	2008	Construction Component
1	40109	Fill	Segregated Costs	3	100	2008	2008	Construction Component
2	904	Slab Porch (SF) with Roof	Porch/Deck	100	100	2008	2008	Appendage Component
2	169	Masonry, Stucco on Block	Exterior Walls	0	100	2008	2008	Construction Component
2	208	Composition Shingle	Roofing	0	100	2008	2008	Construction Component
2	351	Warmed & Cooled Air	Heating/Cooling	0	100	2008	2008	Construction Component
2	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2008	2008	Construction Component
2	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2008	2008	Construction Component
2	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2008	2008	Construction Component
2	621	Slab on Grade (% or SF)	Miscellaneous	1	100	2008	2008	Construction Component
2	40049	High Impact Glass (%)	Segregated Costs	0	100	2008	2008	Construction Component
2	40109	Fill	Segregated Costs	3	100	2008	2008	Construction Component
2	44551	Multi-Family Water & Waste Water Service	Segregated Costs	2	100	2008	2008	Construction Component
3	904	Slab Porch (SF) with Roof	Porch/Deck	100	100	2008	2008	Appendage Component
3	169	Masonry, Stucco on Block	Exterior Walls	0	100	2008	2008	Construction Component
3	208	Composition Shingle	Roofing	0	100	2008	2008	Construction Component
3	351	Warmed & Cooled Air	Heating/Cooling	0	100	2008	2008	Construction Component
3	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2008	2008	Construction Component
3	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2008	2008	Construction Component
3	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2008	2008	Construction Component
3	621	Slab on Grade (% or SF)	Miscellaneous	1	100	2008	2008	Construction Component
3	40049	High Impact Glass (%)	Segregated Costs	0	100	2008	2008	Construction Component
3	40109	Fill	Segregated Costs	3	100	2008	2008	Construction Component
3	44551	Multi-Family Water & Waste Water Service	Segregated Costs	2	100	2008	2008	Construction Component
4	904	Slab Porch (SF) with Roof	Porch/Deck	96	100	2008	2008	Appendage Component
4	169	Masonry, Stucco on Block	Exterior Walls	0	100	2008	2008	Construction Component
4	208	Composition Shingle	Roofing	0	100	2008	2008	Construction Component
4	351	Warmed & Cooled Air	Heating/Cooling	0	100	2008	2008	Construction Component
4	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2008	2008	Construction Component
4	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2008	2008	Construction Component
4	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2008	2008	Construction Component
4	621	Slab on Grade (% or SF)	Miscellaneous	1	100	2008	2008	Construction Component
4	40049	High Impact Glass (%)	Segregated Costs	0	100	2008	2008	Construction Component
4	40109	Fill	Segregated Costs	3	100	2008	2008	Construction Component
4	44551	Multi-Family Water & Waste Water Service	Segregated Costs	2	100	2008	2008	Construction Component
5	904	Slab Porch (SF) with Roof	Porch/Deck	96	100	2008	2008	Appendage Component
5	169	Masonry, Stucco on Block	Exterior Walls	0	100	2008	2008	Construction Component
5	208	Composition Shingle	Roofing	0	100	2008	2008	Construction Component
5	351	Warmed & Cooled Air	Heating/Cooling	0	100	2008	2008	Construction Component
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5	44551	Multi-Family Water & Waste Water Service	Segregated Costs	2	100	2008	2008	Construction Component
6	904	Slab Porch (SF) with Roof	Porch/Deck	96	100	2008	2008	Appendage Component
6	169	Masonry, Stucco on Block	Exterior Walls	0	100	2008	2008	Construction Component
6	208	Composition Shingle	Roofing	0	100	2008	2008	Construction Component
6	351	Warmed & Cooled Air	Heating/Cooling	0	100	2008	2008	Construction Component
6	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2008	2008	Construction Component
6	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2008	2008	Construction Component
6	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2008	2008	Construction Component
6	621	Slab on Grade (% or SF)	Miscellaneous	1	100	2008	2008	Construction Component

6	40049	High Impact Glass (%)	Segregated Costs	0	100	2008	2008	Construction Component
6	40109	Fill	Segregated Costs	3	100	2008	2008	Construction Component
6	44551	Multi-Family Water & Waste Water Service	Segregated Costs	2	100	2008	2008	Construction Component
7	904	Slab Porch (SF) with Roof	Porch/Deck	96	100	2008	2008	Appendage Component
7	169	Masonry, Stucco on Block	Exterior Walls	0	100	2008	2008	Construction Component
7	208	Composition Shingle	Roofing	0	100	2008	2008	Construction Component
7	351	Warmed & Cooled Air	Heating/Cooling	0	100	2008	2008	Construction Component
7	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2008	2008	Construction Component
7	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2008	2008	Construction Component
7	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2008	2008	Construction Component
7	621	Slab on Grade (% or SF)	Miscellaneous	1	100	2008	2008	Construction Component
7	40049	High Impact Glass (%)	Segregated Costs	0	100	2008	2008	Construction Component
7	40109	Fill	Segregated Costs	3	100	2008	2008	Construction Component
7	44551	Multi-Family Water & Waste Water Service	Segregated Costs	2	100	2008	2008	Construction Component

Legal Description:**Short****Legal:**

PCH 018

0436

0009

Long Legal:

PORT CHARLOTTE SEC18 BLK436 LT 9 306/262 539/474 2003/1996 ODN3028/765 EA3048/2071 3205/1974 E3273/903 PCH 018
 0436 0010 PORT CHARLOTTE SEC18 BLK436 LT 10 306/263 539/474 2003/1996 ODN3028/765 EA3048/2071 3205/1974
 E3273/903 PCH 018 0436 0011 PORT CHARLOTTE SEC18 BLK436 LT 11 255/227 DC467/754 539/475 2003/1996 ODN 3028/765
 EA3048/2071 3205/1974 E3273/903 PCH 018 0436 0012 PORT CHARLOTTE SEC18 BLK436 LT12 108/620 560/751 808/1388
 2003/1996 ODN3028/765 EA3048/2071 E3205/1976 3205/1974 E3273/903

Data Last Updated: 8/8/2023- Printed On: 8/8/2023.

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